

NAME _____
Program Manager for _____ Contractor _____
Work Plan FY06

Phase I. Objective: To become familiar with *****Contractor Name***** and their plan to reach goals stated in the plan.							
ECD	Deliverable	Topic	Action Items:	Supporting Guidance	Action Planned	Action Taken	Reference for action taken
04/15/2006	Memo to file containing the observation.	A. General Background:	1. CSP - Review CSP, evaluate its effectiveness. Are the actions in the plan supportive of the proposed goals. Where the proposed changes in the NSM incorporated in the plan. Read the plan thoroughly, gathering a general sense the contractors program. Are the actions stated in the plan clearly supportive of their goals.	DCMA Guidebook-1.5, FAR 19.705-4 and DFARS 219-705-4	Review CSP and compile a list of comments that will be included in memo to file. Comments will be used to focus on Actions throughout the year.	See referenced file.	
04/15/2006	Memo to file containing the observation.		2. Initiatives and Target Industry- Do the industry categories and initiatives that are included in the plan supportive or are they effective in reaching the goals stated in ""Contractor Name""reaching the plan goals. Are there any internal metrics that address Initiatives and Industry categories?	DCMA Guidebook-1.8-1.13	After reviewing initiatives and target industries, record opinion of effectiveness in the memo to file.	See Referenced file.	
04/15/2006	Memo to file containing the observation.		3. Program Reporting- Did the contractor agree to include program level reporting. If so what did the agree to and when will it be supplies to customers.	DCMA Guidebook 1.9	Supply customer requested reports to intended parties.	""Contractor Name""currently supplies program reporting for most of their major programs and distributes them accordingly. No action needed at this time. Will include their response in future plan information.	
04/15/2006	Memo to file containing the observation.		4. Attachments- Are the attachments to the 295 IAW with DCMA CSP Guidebook Chapter 1.	DCMA Guidebook 1.3	Review and comment, include in memo to file.	Attachment contain a detail ad level of information. We recommended on 5/30 that ""Contractor Name""provide responses on the recommendations that are currently open. See Referenced file.	
04/15/2006	Memo to file containing the observation.	B. Performance:	5. Risk Rate- Analyze FY 2005 SF 295. Measure goals against performance. Does ""Contractor Name""have internal Metrics that address goal performance. Did ""Contractor Name""reach the goals in there plan? Are they making continues Improvement? If not see the DCMA Guidebook Section 5. Risk Rate the contractor.	DCMA Guidebook 1.13, Chapter 5 and 8,10,11	Rate ""Contractor Name""using risk factors in the guidebook. Risk rate the contractor and annotate the file.	""Contractor Name"" Risk factor is High. Although ""Contractor Name""is performing well, surpassing most of the goals 4 out of six in their CSP per the semi-annual report ""Contractor Name""SB performance is under 5 percent and ""Contractor Name""is not meeting all of the objectives in their plan. A letter will go out to Jim Albaugh that identifeis ""Contractor Name""issues.	
04/15/2006	Memo to file containing the observation.		6. Analyze FY 2005 SF 295- Did the contractor provide adequate rationale for meeting or exceeding goals? Determine the effectiveness of contractors milestones established. Goals that were not achieved what did the contractor do to address goals that were not achieved.		Review and comment, include in merneo to file.	An analysis of ""Contractor Name""SF 295 was completed. ""Contractor Name""is doing well in meeting their goals. During negotiations, ""Contractor Name""had claims that FCS and the sell of one of their plants would have a negative impact on their performance. There is no evidence of this impact thus far.	
04/15/2006	Memo to file containing the observation.	C. Forecast:	7. Determine the method used to forecast dollars and percentages used in CSP.	FAR 52.219-9, 19.705-4 and DFARS 219-705-4	Meeting with SBLO concerning major changes within the ""Contractor Name""organization	Meeting planned for April 13th to review spend and forecast information. Forecast system was displayed but has not been tested. Accuracy can not be determined until next fiscal year.	
04/15/2006	Memo to file containing the observation.	D. Organization:	8. Organizational structure- How is ""Contractor Name""organized? Become familiar with Organizational Structure (Organizations of this size change frequently. --Learn the changes that effect Supplier Diversity) What are the key Business Units that have a major impact on Supplier Diversity.		Meeting with SBLO concerning major changes within the ""Contractor Name""organization. Write memo to file with comments including discussion points.	April 13 meeting will cover organizational changes and the effect on SD.Changes within the ""Contractor Name""company are on going. Org charts are still changing. See referenced file for latest chart.	
04/15/2006	Memo to file containing the observation.		9. Anticipated Changes in the Corporation- affiliations and partnering organizations/corporations- Will there be any major programs that the company plans on using a large company partner. Are there any planned mergers or acquisitions planned. Will the company structure change in any way?			Changes all across the ""Contractor Name""Company has occurred. One of the largest changes is within the SST. See Referenced files.	
04/15/2006	Memo to file containing the observation.	E. Meetings:	10. ""Contractor Name""-. Several meetings occur involving Supplier Diversity, Determine the most effective meetings to attend.		Attend weekly weekly open Contractor meetings via telecon conference call	Provide comments on meetings attended, add to memo to file.	
04/15/2006	Memo to file containing the observation.		11. DCMA- Schedule a meeting with SBLO to begin the review of ""Contractor Name""-. 1) Forecast Meeting 2) Spend Data 3) Site visits		Planned to determine site review location during April 13 meeting.	Spend data was received. I am currently analyzing the spend data. I am	
04/15/2006	Memo to file containing the observation.		12. Ad Hoc Meetings- On a continuous basis- there are on going situations and questions that will require attention. Establish a regular meeting time to hold discussions.			Quarterly Meetings with leadership takes place to address recommendations in the previous CSP. These meetings will continue until all items are closed.	
			13. Program Name- Determine the requirements per the Services expectations. Provide flow down information to teammates. Perform reviews as required.			There was a meeting with Person 1 and Person 2 to establish working guidelines.	
04/15/2006	Memo to file containing the observation.	F. 22 Questions:	14. Using the findings above, respond to the 22 Questions from the C.N.A. study.		annotate findings in Memo to file	""Contractor Name""deadline to supply a response to the questions is July 7. See referenced file for responses by the Program manager.	
04/15/2006	Memo to file containing the observation.	G. Letter:	15. Issue a letter of concern if any of the information above merits corrective action. The letter will be IAW Chapter 5 of the CSP Guidebook.	Send a letter to the Division Chief stating concerns.	Send concerns after reviewing mid-year performance.	Working on a letter of concern for ACO signature. This letter will address concerns of ""Contractor Name""not meeting all of the planned objectives in the CSP.	
04/15/2006		H: Phase 1 Synopsis:	16. Provide a synopsis to update the file Quarterly				
Phase II Analyze subcontracting performance and spend data. Objective: To determine if opportunity gaps exist.							
	Deliverable	Topic	Action Items:		Action Planned	Action Taken	
07/14/2006		I. Request the spend data:	17. Prepare letter requesting the spend data per business unit per commodity per small business concern.		Work with systems personnel to clarify details of data.	Sent data elements before sending the formal letter. Sent letter requesting spend data March 28.	

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07/14/2006	Write a Memo to the file containing an analysis of the spend data.	J. Analyze the spend data:	18. Learn how each Business Unit contributes to the CSP. From the requested data, learn each business unit, and the types of purchases made from each unit. Determine whether or not opportunity gaps exist. Learn why the exist.		Analyze spend data.	I am currently working on the spreadsheet that analyzes the spend.	
07/14/2006		K. Examine 2006 mid-year performance:	19. Examine the CSP against semi-annual report 2006, Is ***Contractor Name***making progress on goals? Do you know of any events that have caused ***Contractor Name***to make or not make goals?			***Contractor Name***is making adequate progress toward making the goals, however not analyzing and maximizing opportunities where they exist. ***Contractor Name***is still deemed as a High Risk contract. See corresponding section in the memo to file.	
07/14/2006	If ***Contractor Name***is not making adequate progress, send a letter to the Division Chief stating concerns.				Schedule site visits.	Site visit mad April 11 all remaining information presented via teleconference..	
07/14/2006			20. Schedule site visits.				
07/14/2006			21. Use pivot tables for desired results				
07/14/2006			22. Explore opportunity gaps				
07/14/2006			23. Examine each initiative and Targeted Industry and determine the impact on Supplier Diversity. Are the initiatives and Targeted Industries impacting goals?		Complete a performance review NLT June 30 IAW 1.13 of the CSP Guidebook.		
Various		L. Customers:	24. Submit Qtrly reports to Center Director on progress of the Work Plan.			Meeting on June 30th with Center Direcor for discussion.	
various	Send a letter to customers requesting comments.		25. Solicit comments and concerns from customers while distributing the semi-annual performance review.		1)Submit Qtrly report on progress 2)Sumit Qtrly Progress on ***Contractor Name****.	Reportable information is included on open issue database.	
various			26. Provide feedback to customers semi-annually.				
Phase III - Objective: Negotiate an Improved 2007 CSP							
	Deliverable	Topic	Action Item		Action Planned	Action Taken	
06/30/2006	Send the request letter to the contract	M. Send request for CSP:					
			27. Prepare letter requesting the CSP	DCMA Guidebook 1.5	Send letter 1 June, to receive	See reference file. ***Contractor Name***will not submit plan early.	Plan submitted 15 Aug Comments sent to services.
06/30/2006	Submit Negotiated IPT Milestones to the Division Chief.	N. Propose IPT milestones:					
			28. Prepare plan to negotiate the CSP	DCMA Guidebook 1.7, 1.8 and Chapter 2	Document the plan for negotiation of CSP, including milestones.	Proposed Date for negotiations are Sept 5-8	Future activity on hold waiting for direction.
09/01/2006	Prepare the NSM	O. Develop a Negotiation Position:	29. Examine New for compliance with applicable FAR clauses				
09/01/2006			30. Examine Initiatives				
			31. Write the NSM IAW 1.8 of the CSP guidebook	DCMA Guidebook 1.8	Develop a plan that will be tied to my Individual performance use during the negotiation to be in line with my goals..		
09/15/2006		P. Negotiate:	32. Negotiate Plan and Sign by 1 September, 2006				Wait for direction
Phase IV -Review Objective: To perform ***Contractor Name***fiscal year end review for 2006.							
	Deliverable	Topic	Action Items:				
11/15-30/06	Write a 640 report	Q. 640 Review:	33. Perform the annual 640 review.	DCMA Guidebook 1.13	Develop a surveillance plan that will cover the specifics of the planned 640 review. Develop a surveillance tactic that is tied to my PBMP.		